

## GENERAL INSTRUCTIONS


### NAVIGATION HINTS

- **SAVE OFTEN**; always save any changes before navigating to a new screen
- Do not use the ENTER key; use the TAB key to navigate between cells
- Do not use the browser BACK button; use the navigation links at the bottom of each page

### SECURITY

- Access to Salary Planner has been established for specific users by Budget & Planning and any access changes must be done by that office
- Those with department level access can update their department until it is locked
- Those with college/division level access can update and lock all the departments within that college/division

### "DO NOT USE" NOTATIONS

- There are several buttons, inputs, or options that are included in Salary Planner, but should not be used at the department level. These are noted in the instructions with the graphic: 

Following are the general steps (specific instructions later) for using Salary Planner to process new year salary budgets:

## GENERAL STEPS

### DEPARTMENT BUDGET

1. Review the hard copy of the "snap shot" data included with the budget materials
2. Make preliminary salary increase decisions
3. [Login to Salary Planner](#)
4. [Enter salary increases for employees](#)
  - Enter a standard increase as a mass change for all employees
  - Update individual employees as needed
5. [Copy employee increases to positions](#)
6. [Update open positions](#) (vacant positions and budget reserve slots)
7. [Update position labor distribution & copy to employees](#)
8. [Download position labor distribution to Excel](#) in order to check totals
9. [Reconcile/verify state \\$](#)
10. [Update budget worksheet, salary coordination and unfunded plan in Excel](#)
11. Print and send completed budget worksheet, salary coordination and unfunded plan to Dean/VP

### DEAN/VP BUDGET

1. Verify departmental salary increases
2. Verify state \$
3. Lock departments (if needed)
4. Send completed budget worksheets, salary coordinations and unfunded plans to Budget & Planning

## DETAILED INSTRUCTIONS

### GENERAL STEP 3. LOGIN TO SALARY PLANNER

#### SALARY PLANNER LOGIN

1. From a browser, go to <http://banner.usu.edu/>
2. Under USU Banner Links, click **Self Service Banner (SSB)**
3. Click **Login to Access**
4. Enter your User ID (your Banner ID A#) and PIN (if you can't remember your pin, contact the Help Desk and they can reset it for you) then click **Login**
5. Click **Employee**
6. Click **Salary Planner** (if not visible, contact Budget & Planning for security setup)

#### Employee

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[Benefits and Deductions](#)

Retirement, health, flexible spending, miscella

[Pay Information](#)

Direct deposit allocation, earnings and deducti

[Tax Forms](#)

W4 information and 2006 W2 information will k

[Jobs Summary](#)

[Leave Balances](#)

[Salary Planner](#)

7. Always click **Edit Scenario**

#### Salary Planner

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[Create Scenario](#)



[Copy Scenario](#)

[Edit Scenario](#)

[Organization Lock](#)



[Query Multiple Extracts](#)

done only centrally by  
Budget & Planning

## Edit Scenario

Choose Extract ID and Scenario, then select filter criteria.

### Scenario Selection

Extract ID: FY10 BUDGET PROCESS  
 Scenario: FY10 Test Data  
 (for practice or what-if's)  
 Or  
 FY10 Department Use  
 (for real input)

### Scenario Selection

Extract ID: FY07 BUDGET PROCESS  
 Scenario: FY07 TEST DATA  
 FY07 TEST DATA  
 FY07 DEPARTMENT

### Filter Criteria

By Position Attributes  
 (shows multiple positions on a screen)  
 (by **Employee Name** requires the user to  
 input an A number and shows one  
 employee at a time – **DON'T USE**)

### Filter Criteria

By Position Attributes:   
 By Employee Name:

Select

8. Click **Select**

## Position Filters

9. Select any filters to be used

Enter filter criteria and select desired button. Use Ctrl or Shift key to select multiple.

### FY07 BUDGET PROCESS, FY07 TEST

Organizations: All  
 CLAGRI - College Of Agriculture  
 CLATHL - Athletics

Include Subordinate Organizations:

Employee Class: All  
 AD - Administrative Fiscal Year  
 EB - Edith Bowen School Teachers

Bargaining Unit: All  
 None

Faculty Rank: All  
 None

Include Pooled Positions:

Include Vacant Positions:

Number of Records per Page: 25

Not used at USU

List by Employee   Summary Totals   List by Position

10. Click **List by Employee** to enter employee changes (do this first) or **List by Position** to do position changes (do this after making employee changes)

**GENERAL STEP 4. ENTER SALARY INCREASES FOR EMPLOYEES**

**LIST BY EMPLOYEE**

General Notes:

- Mass Change should only be done once at the beginning because it overrides any previous changes
- Ignore Employee Totals information (it shows all jobs)
- Do not update labor distribution in List by Employee, update through List by Position

1. Change **Rounding** to **1.00**
2. Enter salary increases either through mass change

**List By Employee**  
*Mass Change*

**Rounding:** 1.00

**Hourly or Salary:** Both

Reason	Percent	Amount	Include in Change Totals
Annual Budget Increase	2.5		Yes

Mass Apply

or individually. Individual increases can always be adjusted after either method (this is a base salary increase. Labor distribution to fund this base will be addressed later)

**Always save** before doing anything else. (shown at the bottom of the screen)

Save    Reset

Download Job Data    Download Job and Distribution

3. Under **department totals**, check that each employee's Appt % and Base Salary are correct.

**ignore Employee Totals**  
 (shows all jobs, not just your dept)

*DPTEST Testing, Locked, Updateable*

		Employee Totals	D
ID and Name	Position, Suffix and Title	Appointment Percent	Salary
A00940966	700002 - 00 Faculty - Academic Year	100.00	40,000.00
Buck, Fred			
A00940965	700001 - 00 Faculty - Fiscal Year	100.00	36,000.00

- If Appt% needs to be corrected, make sure to put in salary increase is first,

Proposed Appointment Percent	Base Salary	Change Percent	Change Amount
100.00	40,000.00	2.50	1,000.00
100.00	36,000.00	2.50	900.00

then click on Position #/Title

Position, Suffix and Title
700002 - 00 Faculty - Academic Year
700001 - 00 Faculty - Fiscal Year

to go to the job detail.

# 2009-10 SALARY PLANNER INSTRUCTIONS

Date: 3-30-09

## Job Detail for Position and Suffix 700002 - 00

Model:	Proposed	Base	Current
Effective Date:	Jul 01, 2008	Jul 01, 2005	Jul 01, 2005
Title:	Faculty - Academic Year	Faculty - Academic Year	Faculty - Academic Year
Hourly Rate: *	19,231.120	19,231.120	19,231.120
Annual Salary: *	40,000.00	40,000.00	40,000.00
Total Change Percent:	.00		
Total Change Amount:	.00		
Appointment Percent: *	100.00	100.00	100.00
FTE: *	1	1	1
Hours per Day: *	8.00	8.00	8.00
Hours per Pay: *	173.33	173.33	173.33
Salary Group:	FY06	FY06	FY06
Table: *	FA	FA	FA
Grade: *	00	00	00
Step: *	0	0	0
Budget Factor: *	100.00		
Estimated Fiscal Year Budget: *	40,000.00		
Exclude from Totals:	<input type="checkbox"/>		

Make sure when changing Appt % to also change FTE and hours  
(1 FTE = 173.33 hours  
.50 FTE = 86.67 hours)

 DO NOT CHANGE

- If Base Salary needs to be adjusted, correct through Change Percent or Change Amount either before or after entering salary increase. These changes will require some manual calculation.

Proposed Appointment Percent	Base Salary	Change Percent	Change Amount
100.00	40,000.00	2.50	1,000.00
100.00	36,000.00	2.50	900.00

- **Save** any changes

Save Reset Next

- Click **Next** to view the job detail for the next employee

- To return to the employee list, click on the **List by Employee** link

Distr  
List By Employee | List By Pr

4. For summary data (for your information only and not required) click **Download Job Data** to get a report of employee names and positions in Excel format. This provides several tables that show the details of employees and positions.

Save Reset  
Download Job Data Download Job and Dis

Return to Top

- If Excel opened within your browser (default if you are using MS Internet Explorer), click on the Back button to go back to Salary Planner (You will know if you are still within your browser if the navigation buttons are at the top of the screen. Do not hit the close button – this will close the browser and end your Salary Planner session).

- After employee changes are completed, click on **List by Position** to update position/labor distribution (shown at the bottom of the screen)

[ [List By Position](#) | [Summary Totals](#) ]  
 [ [Employee Filter](#) | [Position Filter](#) ]

## GENERAL STEP 5. COPY EMPLOYEE INCREASES TO POSITIONS

### LIST BY POSITION

- Change **Rounding** to 1.00

List By Position  
*Mass Change*  
 Rounding:   
 Percent:   
 Amount:

- Click on **Copy Estimated Budget to Budget** (shown at the bottom of the screen) (this copies the salary increases from employees to positions)

Save Reset  
 Copy Estimated Budget to Budget  
 Download Position Data Download Position and Distribution

## GENERAL STEP 6. UPDATE OPEN POSITIONS

- Correct any open positions since these have been changed to 0

Position and Title	Base Appointment Percent	Proposed Appointment Percent	Base FTE	Proposed FTE	Base Budget	Change Percent	Change Amount	Proposed Budget
B03777 Graduate Assistant Reserve	100.00	100.00	1	<input type="text" value="1"/>	5,000.00	-100.0	-5,000.00	<input type="text" value="0.00"/>
							<-- or -->	
B03777 Graduate Assistant Reserve	100.00	100.00	1	<input type="text" value="1"/>	5,000.00	0.00	0.00	5000.00

Save any changes → Save Reset  
 Copy Estimated Budget to Budget  
 Download Position Data Download Position and Distribution

## GENERAL STEP 7. UPDATE POSITION LABOR DISTRIBUTION & COPY TO EMPLOYEE

- 4. To verify/update labor distribution, click on **Distribution** under the Links column (this must be done on every position)

Proposed Budget	Bargaining Unit	Estimated Fiscal Year Budget	Links	E
36,000.00		36,000.00	<a href="#">Distribution</a> <a href="#">Comments</a> <a href="#">Employee</a>	N

- Labor distribution total % must = 100%
  - **Account should always be 615300**
- Click Percent to modify or delete an existing index

*Proposed*

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount
U	A06728	101165	E05813	615300	1060					100.00	36,000.00
Total										100.00	36,000.00

- Click on **Add a new record** to add new index;

*Proposed*

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount
U	A06728	101165	E05813	615300	1060					100.00	36,000.00
Total										100.00	36,000.00

[Add a new record]

enter the index

then click on **Default from Index** to import FOAP data

### Account Distribution

Budget Distribution for Position 700001 .

COA: U

Index: A06728

Fund:

Organization:

Cost type:

Percent: 50.00

Amount: 18000.00

Default from Index

Save Remove

- Update the % or Amount

and save the changes

- After any distribution changes, click on **Copy Position Distribution to Jobs** (shown at the bottom of the screen) (makes position labor distribution = job labor distribution)



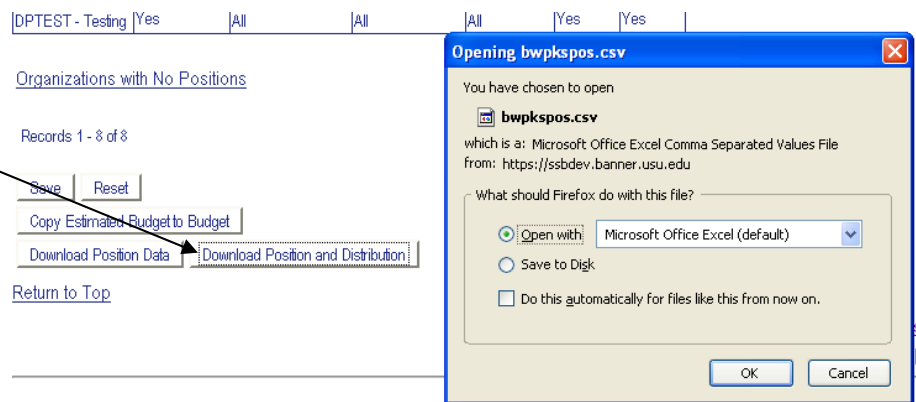
- **DO NOT** click on Update Budget

- Return to the List By Position screen and verify / update the distribution on the next position by repeating the steps above (**DO NOT** use the browser back button)



## GENERAL STEP 8. DOWNLOAD POSITION LABOR DISTRIBUTION TO EXCEL

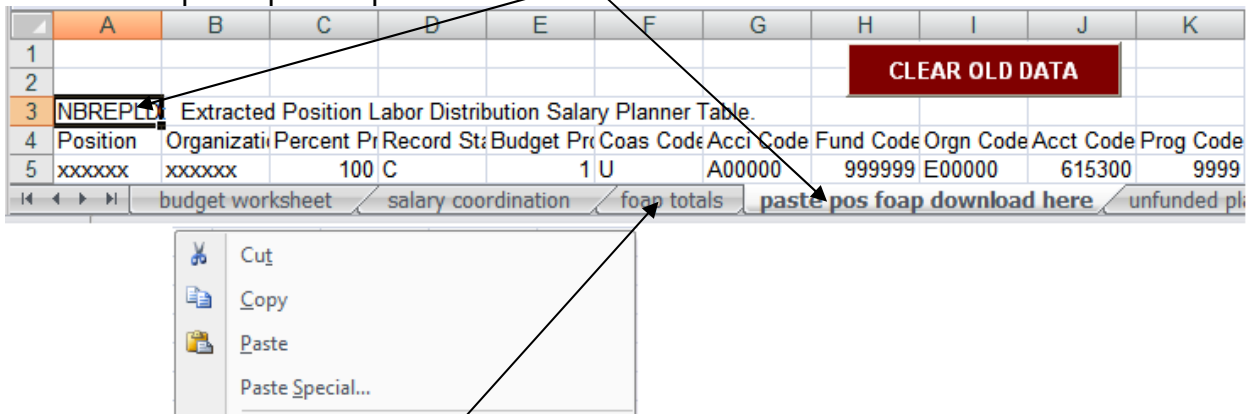
5. After all position and labor distribution changes have been completed, click on **Download Position and Distribution** to get FOAP data and paste in Excel Budget File to calculate FOAP totals



- Select and Copy (right click on the selected cells and choose copy) the third section of downloaded report labeled NBREPLD

Position	Organization	Percent	Pr Record	St: Budget	Pr: Coas	n Code	Acct Code	Prog Code	Actv Code	Loen Code	Proj Code	Ctyp Code	Account Code	External
700001	DPTEST	98	C	35280	U	813	615300	1060						
700001	DPTEST	2	C	720	U	813	615300	1060						
700002	DPTEST	100	C	40000	U	813	615300	1060						
700003	DPTEST	50	N	6000	U	813	615300	1060						
700003	DPTEST	50	N	6000	U	197	615300	8060						
700004	DPTEST	100	C	18000	U	813	615300	1060						
700005	DPTEST	100	C	0	U	813	615300	1060						
B01777	DPTEST	100	N	0	U	813	615300	1060						
B02777	DPTEST	100	N	0	U	813	615300	1060						
B03777	DPTEST	100	C	0	U	813	615300	1060						

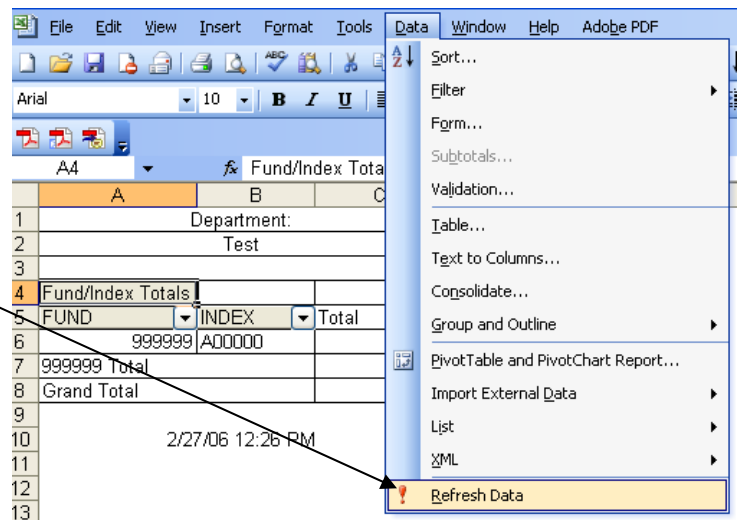
- Open the Excel Budget File, and Paste (right click on the cell A3 and choose paste) of the tab "paste pos foap download here"



- Click on the foap totals tab.

Make sure cursor is within pivot table (cell A4 for example), click on Data drop-down menu, then click on Refresh Data to recalculate FOAP totals.

(your menu may look different. Accept any pop-up message you may receive about replacing data.)



## GENERAL STEP 9. RECONCILE / VERIFY STATE \$

- Use these totals to complete "salary coordination" tab

A	B	C	D	E	F
1	2006-07 E&G SALARY COORDINATION				
2					
3	Department / Account: Test				
4	College / Division: Student Services				
5	Index: A06728				
6	TOTAL E&G SALARY:				109,200
7					
8					
9	E&G salary budgeted WITHIN the department:				109,200
10					
11					
12	Detail of E&G salary authorized for use by other departments:				
13					
14	Other Department(s)	Employee Name	\$		
15	1.				
16	2.				
17	3.				

Target allocation for your Index hardcoded by Budget & Planning

Type in the number for your Index

Input other departments that you authorize to use your departments money here

A	B	C
1	Department:	
2	Test	
3		
4	Fund/Index Totals	
5	FUND	INDEX Total
6	101165	A06728 109,200
7	101165 Total 109,200	
8	101161	A06123 6,000
9	101161 Total 6,000	
10	Grand Total 115,200	
11		

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**GENERAL STEP 10. UPDATE BUDGET WORKSHEET AND SALARY COORDINATION SHEETS IN EXCEL**

**BUDGET WORKSHEET TABS**

1. Budget Worksheet
  - use to balance total E&G budget by object (salary, wages, operating)
2. Salary Coordination
  - use to balance total E&G salary budget (salary spent within your department (from salary planner foap totals) and the salary authorized to be spent by other departments)
3. FOAP Totals
  - use to calculate labor distribution totals from Salary Planner download
4. Paste Pos FOAP Download Here
  - use to paste data from Salary Planner download
5. Unfunded Plan
  - use to justify use of central unfunded index and show plan of funding
6. Salary Base Increase Calculation
  - use to assist in calculating salary increases